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## India

## Cotton and Products Annual

**2011**

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**Report Highlights:**

India's MY 2011/12 (August/July) cotton production is forecast to increase to a record 27.3 million U.S. bales on expected record cotton planting of 12.5 million hectares. Consumption is forecast to increase to 22.6 million bales on expected strong domestic and export demand for cotton textiles. The Government of India has not announced if it will again restrict exports of cotton in MY 2011/12. However, strong consumption and a record low stocks-to-use ratio are expected to limit exports to 5.1 million bales. Imports are likely to be limited to 500,000 bales, mostly of extra long staple cotton.

## Commodities:

### Cotton

#### Production:

India's marketing year (MY) 2011/12 (August/July) cotton production is forecast to increase to a record 27.3 million bales (35.0 million Indian bales of 170 kg) on expected record planting. Record cotton prices (Table 5) are expected to lead to a 12 percent increase in planted area in MY 2011/12 on a record 12.5 million hectares (Table 3A). Currently, cotton appears to be the most remunerative major crop in India and few, if any, *khari*f (monsoon season) crops can match its potential returns for farmers given current price expectations. Biotech cotton, which accounts for an estimated 90 percent of Indian cotton, is proving to be a relatively stable crop from a yield perspective and not as vulnerable to weather variations as competing crops, especially in the largely unirrigated central and southern states (Table 3B). While even larger area is certainly possible, especially if weather conditions at planting are favorable, then most farmers' traditional tendency is to diversify their plantings as a hedge against risk. Concerns about the availability of seeds are expected to constrain significant area expansion. Seed companies have already expressed concern about seed supplies, but farmers will have the option of planting seeds saved from the 2010 harvest or procured from unregulated seed suppliers. Cotton yields in MY 2011/12 are forecast marginally lower at 476 kg per hectare on the expectation of increased planting of lower quality seeds.

MY 2010/11 production is now estimated lower at 25 million bales (32 million Indian bales) from the previous estimate of 26 million bales due to higher than estimated damage resulting from unseasonal rains during October and November in Gujarat, Maharashtra and Andhra Pradesh, and extreme cold temperatures during January/February in the central states which adversely affected late season flushes and pickings. There have been no reports of significant pest or disease occurrences from any of the growing areas, or any shortage of seeds, fertilizers or pesticides during the season. Cotton yield in MY 2010/11 is unchanged from last year, but overall quality is reportedly lower than last year due to rain damage at the time of maturity and harvest. On February 26, 2011, India's Cotton Advisory Board revised the MY 2010/11 crop lower to 24.4 million bales (31.2 million Indian bales), but industry sources currently estimate the crop in the range of 24.0 to 26.0 million bales. Continued strong arrivals and market reports of farmers holding larger quantities of seed cotton in anticipation of higher late-season prices support a slightly higher estimate than the current Cotton Advisory Board estimate.

**General Outlook:** Cotton, a predominantly monsoon-season crop, is planted from the end of April through September, and harvested in the fall and winter (Table 3B). Planting intentions are largely influenced by the relative price and profitability of cotton relative to competing crops such as rice, guar, and fodder crops in the north; coarse grains, pulses, and sugarcane in the central region; and rice, tobacco, and chilies in the south. The states of Gujarat, Maharashtra and Andhra Pradesh are the major producers accounting for nearly 80 percent of total production (Table 3A).

With the area under Bt cotton and improved varieties now reaching an estimated 90 percent of total area, prospects for future growth in productivity are limited as most cotton is grown under rainfed conditions and on small farms<sup>[1]</sup>. Although some potential exists for a further increase in yields, cotton farmers will have to make significant investments in production technologies for improved management of irrigation, fertilizers, micro nutrients, pests and diseases to boost yields above current levels. If prices remain firm and cotton area continues to expand, industry sources suggest that India's cotton production could peak at 31.2 million bales (40 million Indian bales) in the next few years.

**Extra Long Staple (ELS) Cotton:** India's ELS cotton production has been stagnant over the last several years. However, ELS cotton production in MY 2011/12 is forecast to improve to 187,000 bales (240,000 Indian bales) on relatively strong price realizations vis-à-vis competing long staple cotton varieties and other competing crops during the current season. There are very few Indian cotton varieties (DCH-32, TCH-213, and *Suvin* grown mostly in southern India) that meet international ELS specifications. The fiber quality and yields of these varieties have deteriorated in recent years causing marketing problems and lower returns to growers. Therefore, farmers are increasingly shifting to long staple varieties

(Bunny, Brahma, and other 30-34 mm cotton varieties), which have higher yields and fewer quality problems. Efforts to improve the productivity of ELS parent lines have met with limited success.

**Bt Cotton:** Since its introduction in 2002, Bt cotton has been a major success story in Indian agriculture. In a span of eight years, Bt cotton planting has expanded to an estimated 90 percent of total cotton area and accounts for over 95 percent of India's cotton production. Bt cotton area is expected to again reach 90 percent of total area in MY 2011/12, but the share of unapproved Bt seeds is expected to increase. To date, the Government of India has approved six biotech events and more than 300 hybrids for cultivation in different agro-climatic zones. In addition to the approved varieties, there are an estimated 40-50 Bt cotton hybrids that are developed and multiplied informally outside of regulated marketing channels and sold at cheaper rates vis-à-vis approved hybrids. One of the results of the adoption of Bt cotton has been a significant shift in the varietal profile and share of different types of cotton being produced in India. Most of the Bt hybrids are of medium and long staple cotton (26 to 32 mm), which is resulting in declining production of short staple (below 22 mm) and extra long staple (35 mm and above). If the current trend continues, the domestic textile industry may seek to increasingly augment their extra long staple and short staple cotton requirements through imports.

**Value-Added Cotton:** India is the second largest producer of textiles and garments after China, largely catering to the 1.2 billion consumers in the domestic market. The textile and clothing industry is largely cotton-based, accounting for 11 percent of industrial production, 12 percent of total export earnings, four percent of GDP and providing direct employment to over 35 million people and indirect employment to an additional 55 million people<sup>[2]</sup>. Since early 2009 the Indian textile industry has benefitted from sufficient domestic cotton supplies and strong domestic demand. Domestic textile production in Indian Fiscal Year (IFY) 2010/11 (April/March) was further supported by a strong recovery in export demand for cotton yarn and textile products as India's cotton export restrictions helped to discount the price of Indian cotton relative to the international market. Consequently, growth in the production of cotton yarn and fabric recovered strongly in IFY 2010/11 (Tables 10 & 13). Industry sources expect continued growth in the textile industry given strong domestic and international demand and the likelihood that the government will continue to limit exports of raw cotton. However, continued high cotton prices may slow the growth in production in IFY 2011/12. Besides high cotton prices, the challenges facing the textile industry include infrastructure impediments (power and road) and labor policies.

The Indian textile industry includes both an "organized" sector (large-scale spinning units and composite mills) and an "unorganized" sector (small-scale spinning units, power looms, handlooms, hosiery units). More than 95 percent of yarn is produced in the organized sector. The weaving industry is mainly supplied by the unorganized sector, with power looms accounting for 60 percent, handlooms for 18 percent, and hosiery units for 17 percent of total cloth production. The organized sector weaving mills account for the remaining 5 percent of cloth production.

<sup>[1]</sup> There are about 5.5 million cotton farmers with the average size of holding of less than a hectare which limits their ability to adopt capital intensive production technologies and infrastructure.

<sup>[2]</sup> Source: [Confederation of Indian Textile Industry](#)

## Consumption:

Cotton consumption in MY 2011/12 is likely to benefit from forecast record domestic raw cotton production and continued strong domestic and export demand for cotton yarn and other textile products. However, abnormally high cotton prices and high prices of cotton textile products may temper growth in domestic consumption. Consequently, MY 2011/12 consumption is forecast to increase five percent to 22.6 million bales (29.0 million Indian bales). A growing Indian population coupled with forecast strong growth in the economy [1] should support domestic demand for cotton textiles.

India's cotton consumption in MY 2010/11 is estimated at 21.5 million bales, more than 10 percent above the previous year, on strong export and domestic demand for textile products. The latest official monthly consumption figures for the period August 2010 to January 2011 support the estimate. With the government imposing export restrictions on cotton right from the beginning of the season, lower domestic cotton prices relative to the international market made Indian cotton yarn and textile products very price competitive in foreign markets. Strong international demand coupled with the relatively stable value of the Indian Rupee further fueled export demand for Indian cotton textiles, augmenting growth in cotton consumption. Despite high cotton prices, domestic demand for cotton textiles continues to be supported by growing incomes of the expanding middle class and the strong rural economy. However, current high cotton prices will likely eventually be

reflected in higher cotton textile product prices for consumers, and may dampen purchases of cotton clothing and textiles or cause consumers to shift to man-made fibers.

### **ELS Cotton:**

MY 2010/11 ELS cotton consumption is forecast higher at 437,000 bales (560,000 Indian bales) on continued demand for finer count yarns and fabrics, both for domestic and export markets. India's domestic consumption requirement for ELS cotton is largely met through imports and the United States is one of the major suppliers. ELS cotton is used for the production of quality yarn, fabric, and dress material for a small but growing high-end domestic market segment and for export. Local mills are increasingly using the long staple varieties for blending with imported ELS cotton for the production of quality yarn and fabric.

### **Cotton Prices:**

Despite sufficient domestic supplies, domestic cotton prices in MY 2010/11 reflected the increase in international prices. Current prices of commonly traded varieties are trading in the range of \$1.7 to \$1.8 per lb., more than double a year ago (Table 5). Nevertheless, government restrictions on exports of cotton kept domestic prices 10-20 percent lower than prices of comparable cotton from other origins during most of the marketing season.

While forecast sufficient domestic supplies and export restrictions will likely keep domestic cotton prices at a discount to international prices, domestic cotton prices during the upcoming MY 2011/12 are expected to closely follow the general direction of international cotton prices.

**Value Added Cotton:** Due to warm weather conditions and tradition, cotton is traditionally the preferred fiber in India. However, poly-cotton blends are becoming increasingly popular in India due to their durability and ease of maintenance. Industry sources report that higher cotton prices have caused some mills to shift their cotton/polyester blends in favor of polyester. Prices of cotton relative to man-made fibers (MMF) will be key in determining the future growth of cotton usage in India.

Despite high cotton prices (Table 15), cotton's share in the textile industry's total fiber use grew for the second consecutive year in IFY 2010/11 (April/March) largely due to strong export demand for yarn. Assuming the current price ratio between cotton and MMF remains stable; cotton's share of total fiber use is expected to decline to 60 percent in IFY 2011/12.

<sup>[1]</sup> The growth in the Indian economy in Indian fiscal year 2010/11 (April/March) is estimated at 8.3 percent, and is forecast at 9.0 percent in IFY 2011/12. As per the last census, the Indian population has been growing at 1.8 percent per annum.

### **Trade:**

Following the dramatic increase in cotton production after the introduction of Bt seeds, India has emerged as one of the world's leading cotton exporters. Growing concerns in the textile industry over rising cotton exports has caused the government to initiate various cotton export control measures since the beginning of 2010 (see Trade Policy section) including export quota restrictions.

Despite record domestic production, MY 2011/12 cotton exports are forecast at 5.1 million bales, slightly higher than the previous year, as low ending stocks and strong consumption are expected to limit exportable supplies. It is not clear if the government will again restrict cotton exports, but industry observers expect that some type of export restriction will be implemented in 2011/12. Imports in MY 2011/12 are forecast at 500,000 bales, mostly ELS and long staple specialty cotton for high-end cotton textile products for exports and domestic niche markets.

After notifying that exports of new crop cotton would be allowed in August of 2010, the government established an export quota of 4.3 million bales (5.5 million Indian bales) for the MY 2010/11 season. Exporters were required to register their export contracts with the Textile Commissioner's Office (TCO) from October 1, 2010 with the quota allocation done on first-come-first served basis. The TCO issued export authorization certificates for exports of 3.92 million bales (5.02 million

Indian bales) of raw cotton, of which only 3.07 million bales (3.93 million Indian bales) were shipped during the specified shipment period of November 1 to December 15, 2010. The export destinations for the cotton registered with TCO were China (1.88 million bales), Bangladesh (620,000 bales), Pakistan (203,000 bales), Vietnam (114,000 bales), Taiwan (960,000 bales) and other Asian countries.

In the first week of January 2011, export contract registration procedures were shifted to the Directorate General of Foreign Trade (DGFT) for the unsold quantities of the export quota disbursed by the TCO. Based on information from the TCO, the DGFT issued export authorizations for an additional 1.48 million bales (1.9 million Indian bales) to be shipped during January 27 to February 26, 2011. Although the export shipment of the contracts registered with DGFT is not available, industry sources report that exporters have shipped almost the full quantity of the DGFT allocation. Given relatively tight domestic supplies, the government is unlikely to announce any additional export quota allocation for this season. Consequently, MY 2010/11 exports are expected to reach 4.8 million bales assuming some export spillover from the MY 2009/10 crop during August-September of 2010.

Although official imports statistics are available only for the first three months (Aug-Oct, 2010) of the marketing year, industry sources report that MY 2010/11 imports may reach 450,000 bales, mostly ELS and some specialized long staple cotton from the U.S., Egypt, and West Africa.

**Value Added Cotton:** After two years of weak cotton textile export growth, exports in IFY 2010/11 are expected to rise significantly (Table 17) on strong exports of cotton yarn, made-ups and fabric. While official statistics are available for the first five months (Apr-Sep'2010) of the IFY, market sources report continued strong growth in exports due to India's cotton price advantage and improving global demand. Cotton yarn exports in IFY 2010/11 will likely reach the government's export quota of 720 million kg, more than 22 percent higher than last year's 589 million kg. With high export prices, the value of yarn exports is expected to be significantly higher. Industry sources expect strong exports in IFY 2011/12, provided the government again restricts cotton exports, thereby discounting Indian cotton relative to international prices.

Cotton textile exports account for 18-20 percent of the total cotton textile production. Cotton ready-made garments account for the major share of cotton textile exports followed by cotton made-ups, cotton yarn and cotton fabric. Indian textile exports are typically targeted at the lower quality end of the international market. In the years following the conclusion of the Multi-Fiber Agreement, leading textile manufacturers have made significant investments in modern equipment and production integration to gain more leverage in the global market. Select modern integrated textile units are now focusing on exports of finer count yarns, fabric, and branded garments for the higher quality international markets.

## **Stocks:**

Despite restrictions on exports, MY 2010/11 ending stocks are estimated to decline to 5.5 million bales compared to 6.3 million bales a year ago, resulting in a record low stock-to-use ratio of 25.7 percent. These stocks are just sufficient to meet the consumption requirement for three months and carry mills through the first few months of the new crop season. Despite forecast record domestic production, strong consumption is expected to pressure MY 2011/12 ending stocks which are forecast at 2.6 million bales, barely sufficient for three months of consumption and a stocks-to-use ratio of 24.9 percent.

## **Policy:**

### **Production Policy**

The Government of India (GOI) establishes a minimum support price (MSP) for cotton at the beginning of every marketing season. The Cotton Corporation of India (CCI), a central government organization, is responsible for price support operations in all states, but is occasionally assisted by state government marketing organizations. Typically, market prices remain well above the MSP, except for MY 2008/09 when MSP prices were hiked significantly. Government agencies purchase seed cotton at the MSP and sell the processed cotton at market prices; losses incurred in the operation are borne by the government exchequer. Due to strong market prices, government agencies have not made any significant procurement under the MSP in the last two years. Besides MSP operations, CCI and state marketing organizations are also involved in purchasing cotton at open market prices for commercial sales. Futures' trading in cotton was launched by the Cotton

Association of India (formerly the East India Cotton Association) in 1998; subsequently three more commodity exchanges trade cotton futures. However, cotton futures have not gained enough volume to significantly affect the market.

Various central and state government agencies and research institutions are engaged in cotton varietal development, seed distribution, crop surveillance, integrated pest management, extension and marketing activities. In 1999, the central government launched the Technology Mission on Cotton (TMC) to improve the availability of quality cotton at reasonable prices. The goal of the TMC is to focus on bringing about improvement in the production, productivity and quality of cotton through research, transfer of technology and improvement in the marketing and processing sectors.

In 1999, the Ministry of Textiles launched the Technology Upgradation Fund Scheme (TUFS) that provides an interest subsidy on loans intended to upgrade and modernize the textile industry. In 2007, the government launched the Scheme for Integrated Textile Parks to provide the textile industry with world-class infrastructure facilities. The central government also has several ongoing schemes for development of specific sectors like handlooms and power looms <sup>[1]</sup>. Several state governments supplement central government efforts to develop the textile industry through tax incentives and other schemes in their respective states.

### **Trade Policy**

Since April 2010, the GOI has made various policy changes on exports of raw cotton (see Box 1). Current trade policy imposes quantitative restrictions on exports of raw cotton. The GOI has established an export quota of 4.3 million bales for MY 2010/11. The GOI has not made an official announcement concerning an export quota for 2011/12 and it is not yet clear if there will be a quota. However, most industry observers expect that a quota will be established once reliable estimates of the 2011 crop become available after planting is over in September 2011.

#### **India's Export Policy Changes since Beginning 2010**

- Prior to April, 2010, exports of raw cotton were allowed without any restrictions or export taxes. Export contracts had to be registered with the TCO.
- On April 9, 2010, the GOI imposed an export tax of Rs. 2,500 (\$5.6) per metric ton on raw cotton.
- On April 19, 2010, the TCO suspended registration and exports of raw cotton (GAIN IN1039).
- On May 21, 2010, the government moved exports of raw cotton to the restricted list, thereby imposing licensing restrictions on exports of raw cotton. The DGFT issued export license for the unshipped export contracts registered with the TCO prior to April 19, 2010 (IN1049).
- On August 17, 2010, the government removed licensing restrictions on exports of raw cotton by moving it from the restricted list to free list and removed export tax. However, all export contracts had to be registered with the TCO (GAIN IN1081).
- On September 18, 2010, the Empowered Group of Ministers established an export quota of 4.3 million

bales (5.5 million Indian bales) for Indian marketing year 2010/11 (October/September).

- On October 1, 2010, the TCO commenced export contract registration and closed registration on October 10, 2010 when the quota limit was reached. The TCO issued export authorization for 3.92 million bales to be shipped within the period of November 1 to December 15, 2010.
- On December 16, 2010, the GOI issued a notification stating that exports of cotton were to be registered with the DGFT instead of the TCO.
- On December 16, 2010, the DGFT issued a circular stating the modalities of registration and export of the ‘unutilized’ export quota that could not be shipped before December 15, 2010 (GAIN IN1101).
- In early January, the DGFT registered about 1.48 million bales (1.9 million Indian bales) of export contracts against the estimated ‘unutilized’ cotton quota that could not be shipped prior to December 15, 2010, for shipment during January 27-February 26, 2011.
- Since February 27, 2011, no further exports of raw cotton have been allowed.

India’s exports of all textile products were liberalized in January 2005 with the expiration of the Multi-Fiber Agreement. However, the GOI imposed licensing and quota restrictions on exports of cotton yarn for the IFY 2010/11. In April 2010, the government announced compulsory registration of cotton yarn for exports with the TCO. Later in December 2010, the government established the cotton yarn export quota for the IFY 2010/11 at 720 million kilograms, and imposed licensing restrictions. In February 2011, the DGFT issued a notification allowing registration of the unshipped quantities (estimated at 50 million kg) of the 720 million kg cotton yarn quota that was registered with the TCO but could not be shipped. Further, the government has exempted exports of special cotton yarns and cotton yarn produced by Export Oriented Units from the quota restrictions. Industry sources report that the government is likely to continue with the existing cotton yarn export policy (licensing and quota restrictions), but may increase the export quota for IFY 2011/12 to as much as 900 million kg.

In an effort to promote the export of value-added cotton textiles, the GOI provides various incentives. Export oriented units (EOUs) and firms importing against an advance license receive a duty drawback (zero duty for EOUs, and duty discounts for others) on imports of raw materials for the export of value-added goods. Under the “Export Promotion Capital Goods” plan, imports of capital goods and machinery are allowed at reduced duty rates against export obligations (zero duty for a 100 percent EOU). Furthermore, the GOI provides textile exporters with government assistance worth 2 percent of the value of exports to the United States and E.U. in the form of duty free scrips under the Market linked Focus Product Scheme. The scrips can be used for importing goods duty-free and is transferable to other importers.

The import tariff on cotton and cotton textile products (Table 19) remained unchanged in the 2011 Indian budget that is effective for March 1, 2011.

[1] For more information on TUFs and other central government schemes for the textile industry, refer the website of Office of the [Textile Commissioner](#) and review various schemes in the heading ‘Progress of Central Schemes’.

## **Marketing:**

India is expected to continue as an exporter of cotton for at least the next few years, but exports will likely continue to be “managed” unless global cotton prices come down significantly. Most exports are expected to be of medium-to-long staple cotton (25 to 32 mm length) to China, Bangladesh and East Asian countries. However, India will likely continue to import ELS and quality long staple cotton (28-34 mm), with occasional imports of short staple cotton (below 22 mm) when international prices are favorable. The United States has been the leading supplier of cotton to India over the past few years.

Indian mills importing U.S. Pima and upland cotton recognize its quality and consistency, and are ready to pay some premium over competing origins. However, U.S. cotton faces competition from neighboring suppliers like Egypt, West Africa, the Commonwealth of Independent States (CIS), and Australia due to their freight advantage and shorter delivery periods.

## **Production, Supply and Demand Data Statistics:**

**Table 1: Commodity, Cotton (480 lb bales), PSD**

Cotton India	2009/2010		2010/2011		2011/2012	
	Market Year Begin: Aug 2009		Market Year Begin: Aug 2010		Market Year Begin: Aug 2011	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	10,310	0	11,160		12,500
Area Harvested	10,260	10,310	11,000	11,160		12,500
Beginning Stocks	8,919	8,919	6,319	6,349		5,499
Production	23,000	23,000	25,000	25,000		27,300
Imports	600	480	500	450		500
MY Imports from U.S.	0	193	0	100		150
Total Supply	32,519	32,399	31,819	31,799		33,299
Exports	6,550	6,550	4,800	4,800		5,075
Use	19,650	19,500	21,500	21,500		22,600
Loss	0	0	0	0		0
Total Dom. Cons.	19,650	19,500	21,500	21,500		22,600
Ending Stocks	6,319	6,349	5,519	5,499		5,624
Total Distribution	32,519	32,399	31,819	31,799		33,299
Stock to Use %	24	24	21	21		20
Yield	488.	486.	495.	488.		476.
TS=TD		0		0		0

Note: 1. Area in thousand hectares, Other PSD numbers in thousand 480 lb.

2. Note: Production figures in the table include 937,000 bales of loose cotton.

**Table 2: Commodity, ELS Cotton (1-3/8" or 35mm staple length and above)**

Units : 480 lbs bales	2007/08	2008/09	2009/10	2010/11	2010/11
	(Final)	(Revised)	(Revised)	(Forecast)	(Forecast)
Beginning Stocks	51,736	59,545	90,777	51,736	36,120
Production	156,162	140,546	132,738	171,778	187,394
Imports	273,284	281,092	234,243	234,243	265,475
Total Supply	481,182	481,182	457,758	457,758	488,990
Exports	0	0	0	0	0
Domestic Consumption	421,637	390,405	406,021	421,637	437,254
Ending Stocks	59,545	90,777	51,736	36,120	51,736
Total Distribution	481,182	481,182	457,758	457,758	488,990

Source: Trade sources

**Table 3A: Area, Production & Yield of Cotton in Major States**

(Area 000 ha; Production 000 bales, Yield kg/ha)



		Final	Final	Final	Revised	Forecast
STATE		2007/08	2008/09	2009/10	2010/11	2011/12
Maharashtra	Area	3,194	3,142	3,503	3,973	4,400
	Production	4,841	4,841	4,919	6,090	6,403
	Yield	330	335	306	334	317
Gujarat	Area	2,422	2,354	2,625	2,633	2,800
	Production	8,589	7,027	7,652	8,120	8,355
	Yield	772	650	635	671	650
Madhya Pradesh	Area	630	625	611	651	700
	Production	1,562	1,405	1,171	1,327	1,405
	Yield	540	490	417	444	437
Punjab	Area	604	527	511	530	650
	Production	1,562	1,366	1,113	1,249	1,562
	Yield	563	565	474	513	523
Haryana	Area	483	456	507	495	580
	Production	1,171	1,093	1,152	1,093	1,249
	Yield	528	522	495	481	469
Rajasthan	Area	339	302	444	334	500
	Production	703	586	859	703	1,015
	Yield	451	422	421	458	442
Andhra Pradesh	Area	1,138	1,399	1,475	1,776	1,950
	Production	3,592	4,138	4,060	4,216	4,841
	Yield	687	644	599	517	541
Karnataka	Area	402	408	455	534	625
	Production	625	703	703	703	859
	Yield	338	375	336	287	299
Tamil Nadu	Area	119	109	104	130	180
	Production	312	390	390	390	547
	Yield	571	780	817	654	661
Others	Area	108	84	75	105	115
	Production	78	156	156	156	156
	Yield	157	405	453	324	296
Loose	Production	937	937	937	937	937
All-India	Area	9,439	9,406	10,310	11,161	12,500
	Production	23,970	22,643	23,112	24,985	27,328
	Yield	553	524	488	487	476

**Note:** Statewise break-up for loose cotton is not available.

**Table 3B: Planting Season, Irrigation & Cotton Type by Major Region**

REGION	STATES	COTTON GROWN	PLANTING SEASON & IRRIGATION STATUS
North	Punjab, Haryana, Rajasthan	Medium & Short Staple	End April-May/Largely Irrigated
Central	Gujarat, Maharashtra, Madhya Pradesh	Medium & Long Staple	Mid June-July (after onset of monsoon)/Largely rainfed
South <sup>1</sup>	Andhra Pradesh, Karnataka, Tamil Nadu	Long & Extra Long Staple	August-September/Largely rainfed

**Note:** -There is a small cotton crop planted in January-February in South India.

**Table 4: Cotton Consumption (Mills/Small Spinning Sectors) by Months**  
(Million US Bales)

Month\Year	2006/07	2007/08	2008/09	2009/10	2010/11
Aug	1.402	1.448	1.376	1.451	1.640
Sept	1.400	1.408	1.320	1.455	1.623
Oct	1.353	1.430	1.291	1.429	1.670
Nov	1.391	1.323	1.323	1.448	1.601
Dec	1.444	1.473	1.404	1.522	<b>1.685</b>
Jan	1.423	1.448	1.333	1.506	<b>1.645</b>
Feb	1.336	1.416	1.267	1.447	
Mar	1.436	1.441	1.367	1.520	
Apr	1.410	1.404	1.337	1.501	
May	1.397	1.480	1.392	1.528	
Jun	1.394	1.448	1.406	1.541	
Jul	1.438	1.444	1.482	1.568	
<b>TOTAL</b>	16.823	17.163	16.298	17.916	9.865

**Note:** Figures in bold are provisional estimates.

Source: The Textile Commissioner's Office, Government of India (GOI)

**Table 5: Month-End Prices of Popular Varieties (Rupees per Ton)**

Year	Bengal Deshi (below 22 mm)	SG J-34 (25 mm)	H-4 (28 mm)	Shankar-6 (29 mm)	MCU-5 (33 mm)	DCH-32 (35 mm)
<i>2009/10</i>						
<i>Aug</i>	66,925	63,832	62,426	64,957	68,050	93,077
<i>Sept</i>	65,801	59,614	60,739	62,989	66,644	92,514
<i>Oct</i>	68,613	62,145	61,583	66,925	66,644	92,514
<i>Nov</i>	73,112	68,331	70,581	73,112	75,924	120,916
<i>Dec</i>	68,894	70,862	73,112	76,767	78,455	113,886
<i>Jan</i>	65,519	70,300	70,581	73,112	76,486	112,480
<i>Feb</i>	61,864	71,143	73,393	76,205	77,611	112,480
<i>Mar</i>	59,330	75,360	76,490	79,860	Na	116,700
<i>Apr</i>	61,300	76,490	75,920	77,890	Na	122,320

<i>May</i>	<i>67,490</i>	<i>82,670</i>	<i>80,140</i>	<i>83,520</i>	<i>Na</i>	<i>119,510</i>
<i>Jun</i>	<i>66,360</i>	<i>80,980</i>	<i>80,140</i>	<i>83,520</i>	<i>Na</i>	<i>115,290</i>
<i>Jul</i>	<i>66,930</i>	<i>81,830</i>	<i>80,140</i>	<i>83,800</i>	<i>Na</i>	<i>116,700</i>
<i>2010/11</i>						
<i>Aug</i>	<i>75,080</i>	<i>91,950</i>	<i>92,800</i>	<i>96,170</i>	<i>102,640</i>	<i>122,320</i>
<i>Sept</i>	<i>77,330</i>	<i>99,830</i>	<i>102,640</i>	<i>106,010</i>	<i>115,290</i>	<i>127,950</i>
<i>Oct</i>	<i>78,740</i>	<i>107,700</i>	<i>116,700</i>	<i>118,670</i>	<i>122,320</i>	<i>140,600</i>
<i>Nov</i>	<i>85,770</i>	<i>107,700</i>	<i>112,480</i>	<i>118,100</i>	<i>120,920</i>	<i>140,600</i>
<i>Dec</i>	<i>98,140</i>	<i>117,540</i>	<i>118,670</i>	<i>120,920</i>	<i>123,730</i>	<i>149,040</i>
<i>Jan</i>	<i>119,790</i>	<i>129,910</i>	<i>135,540</i>	<i>137,230</i>	<i>147,630</i>	<i>210,900</i>
<i>Feb</i>	<i>138,910</i>	<i>161,690</i>	<i>157,470</i>	<i>163,100</i>	<i>174,340</i>	<i>233,400</i>
<i>Mar 19</i>	<i>140,320</i>	<i>165,630</i>	<i>163,660</i>	<i>167,880</i>	<i>177,160</i>	<i>233,400</i>

Source: Cotton Association of India (Formerly East India Cotton Association), Mumbai

**Table 6: Cotton Exports by Month**  
(Thousand US bales)

Month\Year	2008/09	2009/10@	2010/11#
Aug	28.3	157.6	45.3
Sept	6.2	249.8	15.9
Oct	23.0	432.8	20.4
Nov	257.7	913.1	3,067.0
Dec	148.5	1,210.9	
Jan	203.3	801.1	<b>1,483.5</b>
Feb	279.3	778.1	
Mar	366.5	1,167.7	
Apr	239.6	461.4	
May	304.0	3.3	
Jun	473.8	91.3	

Jul	41.1	152.0	
<b>TOTAL</b>	2,371.3	6,418.9	4,632.1

**Notes:**

@ MY 2009/10 figures for August 2009 to April 2010 are from the Textile Commissioners Office; May to July 2010 are from the Directorate General of Commercial Intelligence, Ministry of Commerce, which are typically underreported.

# MY 2010/11 figures for August to October 2010 are from the Directorate General of Commercial Intelligence, Ministry of Commerce; November-December 2010 are from the Textile Commissioner's Office; and January to February 2011 are provisional export estimates based on the registration done by the Directorate General of Foreign Trade.

**Table 7: Commodity, Cotton, Export Trade Matrix**

Country	India		
Commodity	Cotton		
Period	August-July	Units	480 lb bales
	2009/10		2010/11*
U.S.A.	2522	U.S.A.	0
China Rep.	2,658,072	Chinese Taipei	35,361
Pakistan	638,719	Bangladesh	16,268
Bangladesh	558,310	Vietnam	8,520
Indonesia	286,286	Hongkong	5,994
Vietnam	264,198	Turkey	4,818
Turkey	259,509	Netherland	3,532
Hongkong	228,291	Indonesia	3,151
Chinese Taipei	140,281	Thailand	2,269
Thailand	118,419	Pakistan	960
Malaysia	63,699	German F. Rep.	207
Total of top 10	5,215,785	Total of top 10	81,079
Others not listed	232,039	Others not listed	514
GRAND TOTAL	5,450,345	GRAND TOTAL	81,593

**Note:** 1. Figures in the table are provisional Directorate General of Commercial Intelligence estimates and are not reflected in the PS&D.

2. MY 2010/11 data are August 2010 to October 2010 (provisional).

Source: Directorate General of Commercial Intelligence, Ministry of Commerce

**Table 8: Commodity, Cotton, Import Trade Matrix**

Country	India		
Commodity	Cotton		
Period	Aug-Jul	Units	480 lb bales
	2009/10		2010/11*
USA	192,641	USA	4,800
Egypt A Rep	87,908	Bangladesh	16,112
Bangladesh	72,821	Egypt A Rep	5,268
Tanzania	22,868	Australia	3,008
Israel	14,330	Burkina FASO	1,144
Sudan	10,881	Sudan	661
Pakistan	10,265	Singapore	551
Burkina FASO	7,160	Turkmenistan	436
Mali	7,027	Indonesia	266
Australia	6,370	China	161
Uzbekistan	6,187	Saudi Arabia	110

Total of top 10	245,817	Total of top 10	27,718
Others not listed	52,107	Others not listed	0
<b>Total</b>	<b>490,565</b>	<b>Total</b>	<b>32,518</b>

**Note:** 1. MY 2010/11 data are August to October 2010 (provisional).

2. Figures include non-spinnable cotton waste not included in the PS&D.

Source: Directorate General of Commercial Intelligence & Statistics (DGCIS), GOI

**Table 9: Growth of the Indian Textile Industry**

Item\IFY Year	1991/92	1995/96	2000/01	2003/04	2004/05	2005/06	2008/09	2009/10	2010/11 (P)
Organised Mills @									
Spinning	846	1294	1565	1564	1566	1570	1653	1673	1992
Composite	271	275	281	223	223	210	177	180	186
Exclusive Weaving	na	172	203	206	202	204	184	183	182
Small Scale Spinning Units @	na	750	996	1135	1161	1173	1247	1260	1398
Power Loom Units ('000s) @	na	326	374	413	426	434	494	505	512
Spindles (millions)@	27.8	31.8	37.9	37.0	37.5	37.5	41.3	42.0	48.1
Rotors ('000s)@	113	226	454	482	500	520	659	675	750
Looms ('000s)@	169	148	140	105	103	92	71	71	70
Power Loom ('000s) @	na	1365	1662	1837	1903	1944	2205	2246	2270

**Notes:** @ - As on end of the Indian fiscal year (31<sup>st</sup> March).

P- provisional, na - not available.

Source: The Textile Commissioner's Office, GOI

**Table 10: Production of Spun Yarn (Fiber-Wise, Million kg)**

Year/1	COTTON	BLENDED	100% NON-COTTON	TOTAL
<b>1995</b>	1,894	395	196	2,485
<b>2000</b>	2,267	646	247	3,160
<b>2001</b>	2,212	609	280	3,101
<b>2002</b>	2,177	585	319	3,081
<b>2003</b>	2,121	589	342	3,052
<b>2004</b>	2,272	585	366	3,223
<b>2005</b>	2,521	588	349	3,458

<b>2006</b>	2,824	635	354	3,813
<b>2007</b>	2,948	677	378	4,003
<b>2008</b>	2,896	655	361	3,912
<b>2009</b>	3,079	707	407	4,193
<b>2010 (E)</b>	3,480	780	425	4,685

**Notes:** /1: Year 2010 refers to Indian fiscal year 2010/11 (April-March)

E- Post estimate based on official estimates for April 2009 to January 2011.

Source: The Textile Commissioner's Office, GOI

**Table 11: Production of Manmade Fiber (Million Kg.)**

<b>Year/1</b>	<b>Viscose</b>	<b>Acrylic</b>	<b>Polyester</b>	<b>Poly-Propylene</b>	<b>TOTAL</b>
<b>1995</b>	194	74	228	1.9	498.4
<b>2000</b>	236	99	566	2.3	904.3
<b>2001</b>	185	95	551	2.4	833.9
<b>2002</b>	225	105	582	2.5	914.5
<b>2003</b>	221	117	613	2.7	953.3
<b>2004</b>	248	128	644	2.9	1,022.6
<b>2005</b>	229	108	628	3.1	968.1
<b>2006</b>	247	97	792	3.5	1,139.6
<b>2007</b>	280	81	880	3.4	1,244.7
<b>2008</b>	233	80	750	3.4	1,066.5
<b>2009</b>	302	91	872	3.4	1,268.4
<b>2010 (E)</b>	302	75	895	3.8	1,275.8

**Notes:** /1: Year 2010 refers to Indian fiscal year 2010/11 (April-March)

E- Post estimate based on official estimates for April 2010 to January 2011.

Source: The Textile Commissioner's Office, GOI

**Table 12: Production of Manmade Filament Yarn (Million Kg)**

<b>Year/1</b>	<b>VISCOSE</b>	<b>POLYESTER</b>	<b>NYLON</b>	<b>POLY-PROPLENE</b>	<b>TOTAL</b>
<b>1995</b>	61	376	42	15	494
<b>2000</b>	55	820	26	19	920
<b>2001</b>	48	866	28	20	962
<b>2002</b>	51	995	30	24	1,100
<b>2003</b>	53	1013	31	21	1,118
<b>2004</b>	54	1004	35	16	1,109
<b>2005</b>	53	1076	37	14	1,179
<b>2006</b>	54	1271	32	13	1,371
<b>2007</b>	51	1420	28	11	1,509

<b>2008</b>	42	1332	28	15	1,418
<b>2009</b>	43	1435	30	15	1,523
<b>2010 (E)</b>	42	1460	33	14	1,549

Notes: /1: Year 2010 refers to Indian fiscal year 2010/11 (April-March)

E- Post estimate based on official estimates for April 2010 to January 2011.

Source: The Textile Commissioner's Office, GOI

**Table 13: Production of Fabric (Square Meters)**

<b>Year/1</b>	<b>COTTON</b>	<b>BLENDED</b>	<b>KHADI/WOOL/SILK</b>	<b>100% NON-COTTON</b>	<b>TOTAL</b>
<b>1995</b>	18,900	4,025	498	8,535	31,958
<b>2000</b>	19,718	6,351	581	13,606	40,256
<b>2001</b>	19,769	6,287	644	15,334	42,034
<b>2002</b>	19,300	5,876	662	16,135	41,973
<b>2003</b>	18,040	6,068	662	17,613	42,383
<b>2004</b>	20,655	6,032	693	17,998	45,378
<b>2005</b>	23,873	6,298	769	18,637	49,577
<b>2006</b>	26,238	6,882	724	19,545	53,389
<b>2007</b>	27,196	6,888	768	21,175	56,027
<b>2008</b>	26,898	6,766	768	20,534	54,966
<b>2009</b>	28,914	7,767	812	22,840	60,333
<b>2010 (E)</b>	31,000	8,125	810	22,100	62,035

Notes: /1: Year 2010 refers to Indian fiscal year 2010/11 (April-March)

E- Post estimate based on official estimates for April 2010 to January 2011.

Source: The Textile Commissioner's Office, GOI

**Table 14: Consumption of Major Fibers/Yarns (Million Kgs)**

<b>Year/1</b>	<b>Cotton</b>	<b>Cotton</b>	<b>Man-made Fibre</b>	<b>Man-made Filament</b>	<b>Total</b>
	Qty	% Share	Qty	Qty	Qty/2
<b>1995</b>	2,295	66.6	557	488	3,446
<b>2000</b>	2,721	58.8	889	878	4,630
<b>2001</b>	2,701	57.7	863	970	4,682
<b>2002</b>	2,699	55.6	915	1,089	4,853
<b>2003</b>	2,652	54.2	940	1,146	4,890
<b>2004</b>	2,886	56.0	978	1,137	5,155
<b>2005</b>	3,222	58.4	954	1,182	5,514
<b>2006</b>	3,580	59.6	1,023	1,258	6,011

<b>2007</b>	3,707	58.8	1,087	1,363	6,307
<b>2008</b>	3,581	58.4	966	1,434	6,130
<b>2009</b>	3,782	58.7	1,093	1,417	6,442
<b>2010 (E)</b>	4,200	61.7	1,110	1,350	6,810

**Notes:** /1: Year 2010 refers to Indian fiscal year 2010/11 (April-March)

/2: Total includes small quantities of other natural yarns – wool, silk, etc

E- Post estimate based on official estimates for April 2010 to January 2011.

Source: The Textile Commissioner's Office, GOI

**Table 15: Prices of Raw Cotton and Other Fibers (Rupees/Kg)**

<b>Period</b>	<b>Raw Cotton Fibre</b>	<b>Viscose Staple Fibre</b>	<b>Polyester Staple Fibre</b>	<b>Acrylic Staple Fibre</b>
	(wtd avg)	(avg)	(avg)	(avg)
March 1995	60.58	76.53	104.55	106.00
March 2000	47.75	78.14	63.34	80.25
March 2001	51.25	86.43	57.43	88.57
March 2002	38.12	80.51	51.51	84.95
March 2003	53.82	84.66	69.25	89.98
March 2004	58.10	87.62	76.22	95.00
March 2005	42.38	91.89	78.95	106.75
March 2006	45.14	90.73	77.12	88.25
March 2007	53.13	100.05	70.84	109.25
March 2008	60.78	115.82	62.24	109.25
March 2009	61.75	104.12	67.08	109.25
March 2010	72.76	127.95	73.35	109.25
March 5 2011	156.23	127.95	100.38	na

**Note:** Prices are average of weekly prices for the month.

Source: The Textile Commissioner's Office, GOI

**Table 16: Per Capita Availability of Cloth in India (Meters)**

<b>Year/1</b>	<b>Cotton</b>	<b>Blended/Mixed</b>	<b>100% Non-Cotton</b>	<b>Total</b>
1995	16.3	3.5	8.2	28.0
2000	14.2	4.5	12.0	30.7
2001	14.8	4.7	12.5	32.0
2002	14.4	4.4	12.6	31.4
2003	13.4	4.5	13.1	31.0
2004	14.1	4.1	15.3	33.5
2005	16.4	4.3	15.4	36.1
2006	17.9	4.7	17.0	39.6
2007	19.0	4.8	18.0	41.9
2008	17.9	4.5	16.6	39.0
2009	19.7	5.3	18.1	43.1



2010 (E)	-	-	-	45.0
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**Notes:** /1: Year 2010 refers to Indian fiscal year 2010/11 (April-March)

P – Provisional estimate; fabric-wise breakup is not available.

Source: The Textile Commissioner's Office, GOI

**Table 17: India's Exports of Textile Items (Million US\$)**

Item	2006	2007	2008	2009	2010*	2009*
<b>Cotton Textiles</b>	11,031	11,970	12,139	11,929	5,376	4,421
Yarn Value	1,678	1,908	1,503	1,610	1,110	484
- Qty (in million kg)	616	664	556	589	322	189
Fabric Value	894	1,035	967	938	420	355
- Qty (in million square meters)	644	658	688	627	257	248
Madeups Value	1,651	1,622	1,494	1,611	830	589
- Qty (in million kg)	334	334	326	282	175	104
Readymade Garments Value	6,808	7,404	8,176	7,769	3,017	2,993
- Qty (in million numbers)	1,835	1,804	2,322	2,205	843	820
<b>Man-made Textiles</b>	3,052	3,697	3,897	4,698	2,036	1,901
Yarn	857	1,124	881	1,012	532	322
Fabric	1,013	1,319	1,628	2,055	762	910
Madeups	179	202	252	269	103	103
Readymade garments	1,002	1,053	1,136	1,361	638	566
<b>Wool Textiles (Yarn/Fabric/Madeups/RMG)</b>	428	447	571	530	195	231
<b>Silk Textiles (Yarn/Fabric/Madeups/RMG)</b>	610	556	537	490	184	198
<b>Other Textiles (Yarn/Fabric/Made-up/RMG)</b>	1,324	1,690	2,023	1,945	999	765
<b>Other Textile Items (Carpets, floor covering, etc)</b>	1,384	1,491	1,324	1,347	630	469
<b>Total</b>	<b>17,829</b>	<b>19,851</b>	<b>20,490</b>	<b>20,939</b>	<b>9,421</b>	<b>7,984</b>

**Notes:**

- Year 2009 refers to Indian fiscal year 2009/10 (April-March)

- 2010\* refers to the period of April-August 2010, i.e., first 5 months of IFY 2010/11

- 2009\* refers to the period of April-August 2009, i.e., first 5 months of IFY 2009/10

Source: 1. DGCIS, GOI.

2. The Textile Commissioner's Office

**Table 18: Existing Import Policy & Tariffs/Duties for Cotton/Cotton Textiles**

Commodity Code	Description of Comm	Policy /1	Basic Duty Rate /2	CVD Rate /3	Special CVD /4	Education Cess/5	Total Duty /6
HC 52.01	Cotton-not carded or combed	OGL	0	0	0	0	0
HC 52.02	Cotton Waste	OGL	0	0	0	0	0
HC 52.03	Cotton-carded or combed	OGL	30	0	4	3	36.136
HC 52.04	Cotton Sewing Thread	OGL	10	/3	4	3	/6
HC 52.05	Cotton Yarn (85% or more cotton)	OGL	10	/3	4	3	/6

HC 52.06	Cotton Yarn (less than 85% cotton)	OGL	10	/3	4	3	/6
HC 52.07	Cotton Yarn for Retail Sale	OGL	10	/3	4	3	/6
HC 52.08	Cotton Fabric (85% or more cotton) Weighing <200gm/sq.m	OGL	Mostly 10 /7	/3	0	/5	/6
HC 52.09	Cotton Fabric (85% or more cotton) weighing >200gm/sq.m	OGL	Mostly 10 /8	/3	0	/5	/6
						/5	
HC 52.10	Cotton Fabric(less than 85% cotton) weighing <200gm/sq.m	OGL	Mostly 10 /9	/3	0	/5	/6
HC 52.11	Cotton Fabric(less than 85% cotton) weighing >200gm/sq.m	OGL	Mostly 10 /10	/3	0	/5	/6
HC 52.12	Other Cotton Fabric	OGL	Mostly 10 /11	/3	0	/5	/6

**Notes:**

/1 : OGL(Open General License)- No restrictions on imports.

/2 : Most goods of the under Chapter 52 get a tariff concession up to 50 percent of the effective basic duty on imports from less developed countries (LDC) members of SAPTA - Bangladesh, Nepal, Bhutan and Maldives.

/3 : CVD (Countervailing Duty) = local excise taxes + Central Cess applied on CIF value of good plus Basic Duty.

Local excise tax rate = 5.15 % for items not containing synthetic fiber

10.30 % for items containing synthetic fiber

/4: Special CVD = 4 percent applied on CIF Value of Good plus Basic Duty plus CVD plus Education Cess. However, cotton fabrics are exempted from Special CVD.

/5 : Education Cess = 2+1 percent of the Basic duty + CVD.

However, education cess exempted in case of items under the HS codes 5208.41, 5208.42, 5208.49, 5208.51, 5208.52, 5208.53, 5208.59, 5209.41, 5209.42, 5209.49, 5209.51, 5209.52, 5209.59, 5210.41, 5210.42, 5210.49, 5210.51, 5210.52, 5210.59, 5211.41, 5211.42, 5211.59, 5212.15, 5212.24, 5212.25.

/6: Total Applicable Duty computation

A: CIF Value of Good

B: Basic Duty = Basic Duty Rate \* CIF Value

C : CV Duty = CVD Rate \* (A+B)

where CVD Rate = Excise Tax Rate + Central Cess

D : Spl CVD = Spl CVD Rate \* (A+B+C)

E: Education Cess = 3% of (B+C+D)

Total Applicable Duty = B+C+D+E

/7: Basic Duty on 5208.39 is 10% or rs. 150/kg

on 5208.41 is 10% or\* rs. 9/sq meter

on 5208.42 is 10% or\* rs. 37/sq meter

on 5208.49 is 10% or\* rs. 200/kg  
on 5208.51 is 10% or\* rs. 27/sqmeter  
on 5208.52 is 10% or rs. 23/sqmeter  
on 5208.59 is 10% or\* rs. 50/sqmeter

/8 : Basic Duty on 5209.31-39 is 10% or rs. 150/kg  
on 5209.41 is 10% or\* rs. 32/sqmeter  
on 5209.43 is 10% or\* rs. 30/sqmeter  
on 5209.49 is 10% or\* rs. 150/kg  
on 5209.51-52 is 10% or\* rs. 30/sqmeter  
on 5209.59 is 10% or\* rs. 38/sqmeter

/9 : Basic Duty on 5210.39 is 10% or\* rs. 150/kg  
on 5210.41 is 10% or\* rs. 15 /sqmeter  
on 5210.49 is 10% or\* rs. 185/kg  
on 5210.51-59 is 10% or\* rs. 15/sqmeter

/10: Basic Duty on 5211.31-39 is 10% or\* rs. 150/kg  
on 5211.41 is 10% or\* rs. 44/sqmeter  
on 5211.42 is 10% or\* rs. 18 per sqmeter  
on 5211.43 is 10% or\* rs. 40/sqmeter  
on 5211.49 is 10% or\* rs. 150/kg  
on 5211.51-59 is 10% or\* rs. 18/sqmeter

/11: Basic Duty on 5212.15 and 5212.25 is 10% or\* rs. 165/kg  
on 5212.24 is 10% or\* rs. 20/sqmeter

\* - Whichever is higher.